

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens professional and courteous service; easy access to information; and guidance through the process to facilitate open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government by providing our stakeholders with timely and accurate information and guidance through the process.
- Ensure timely resolution of assessment appeals and promote public understanding of the process.
- Facilitate understanding and enhance the delivery of our services by promoting personal and professional growth and valuing our staff.

Key Outcome Measures:

Performance Measure	FY 2000-2001 Results	FY 2001-2002 Target	How are we doing?
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Applicant automatically wins appeals not decided or waived within statutory 2 year deadline.	95% of 1999 appeals have been resolved or waived. Cases in litigation included in unresolved.	Target is to attain 100% excluding cases in litigation.	Once the backlog of cases were processed, the COB has been successful in resolving or receiving waivers to meet the statutory deadlines.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: As a service dept, meeting client needs is second only to legal mandates.	COB Dept survey - 100% rated as satisfied or very satisfied. AA Hearings - 100% rated as good or better. Workshops for taxpayers - 98% agreed was useful. Workshop for tax agents - 100% agreed was useful.	100% rating of services as good or better. 100% rating of Community Outreach Workshops as useful.	Overall COB has received favorable ratings from 98-100% of respondents.
NUMBER AND PERCENT OF ASSESSMENT APPEAL INITIAL HEARINGS SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Timely resolution of appeals is beneficial to all parties.	95% of 1999 and 100% of 2000 filings were scheduled for initial hearing within one year.	100% scheduled within one year.	With filings at a manageable level, COB has been successful in providing this level of client service.

At a Glance:

Total FY 2000-2001 Actual Expenditure + Encumbrance:	1,878,211
Total Final FY 2001-2002 Budget:	2,425,121
Percent of County General Fund:	0.11%
Total Employees:	32.00

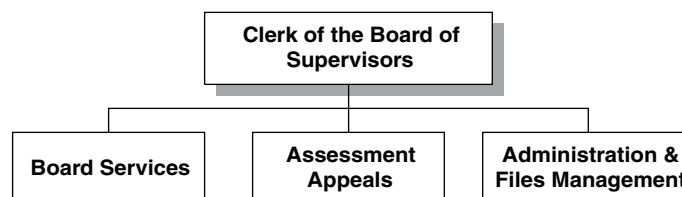
Key Outcome Measures: (Continued)

Performance Measure	FY 2000-2001 Results	FY 2001-2002 Target	How are we doing?
PERCENTAGE OF COB CHANGES/ CORRECTIONS TO BOARD OF SUPERVISORS AGENDA AFTER DISTRIBUTION. What: Measurement of Clerk of the Board's accuracy and training. Why: To provide accurate information in a timely manner and to meet Brown Act noticing requirements.	Clerk of the Board errors were 0.86% in 2000.	Clerk of the Board error rate of 1% or less.	COB's error rate has improved each year.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEAL APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Instructions on completing applications and deadlines should be accessible and easily understood.	86% for 1999 filing year.	75% of applications accurately completed and timely filed.	Percentage has been steadily improving as we continue to expand our outreach efforts.

Fiscal Year 2000-01 Key Project Accomplishments:

- Completed design and began pilot project of Comprehensive Agenda Management System.
- Implemented Conflict of Interest System.
- Developed Conflict of Interest User Manual and Training for departments and other filing agencies.
- Participated in Assessment Tax System Property Tax Administration Vision Project.
- Enhancements to Assessment Appeals systems to streamline process.
- Continued public outreach through workshops, brochures & website.

Organizational Summary



COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

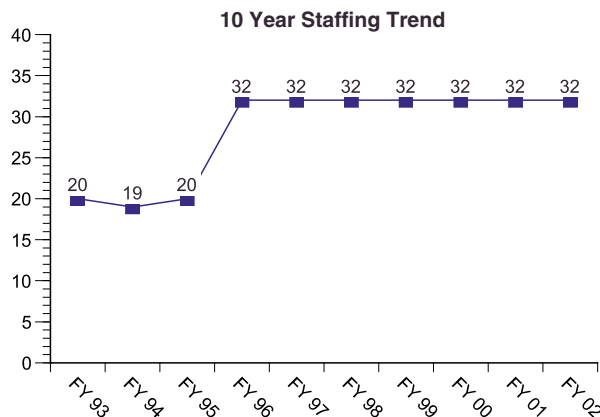
BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Committees and Commissions; processes legal publications, postings and notices; receives and admin-

isters bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing and petty cash functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Requested FY 01-02 budget is consistent with and represents the resources anticipated to accomplish 2001 Business Plan goals.

Through use of automation COB has been able to reduce ongoing operational costs and maintain level staffing. We will continue to pursue automation where efficient and cost-effective.

Changes Included in the Base Budget:

Due to significant increases in automation and resulting system support needs, a Board Services Specialist position will be exchanged for a Systems Programmer/Analyst II.

Final Budget and History:

Sources and Uses	FY 1999-2000 Actual Exp/Rev ⁽¹⁾	FY 2000-2001 Final Budget	FY 2000-2001 Actual Exp/Rev ⁽¹⁾	FY 2001-2002 Final Budget	Change from FY 2000-2001 Actual	
					Amount	Percent
Total Positions	N/A	32	N/A	32	32	0
Total Revenues	459,364	5,500	750,284	44,400	(705,884)	(94)
Total Requirements	1,832,470	1,969,991	2,019,131	2,425,121	405,990	20
Net County Cost	1,373,106	1,964,491	1,268,847	2,380,721	1,111,874	88

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2000-01 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: CLERK OF THE BOARD in the Appendix on page 520.

Highlights of Key Trends:

- COB will continue to pursue automation for cost-savings, efficiencies, and to enhance public access to information and services.
- Assessment appeal filings are remaining at a manageable level, but can be impacted in the future by changes in the economy.

Budget Units Under Agency Control

No.	Agency Name	COB - EXECUTIVE	BOARD SERVICES	ASSESSMENT APPEALS	ADMINISTRATION/FILES MGT	TOTAL
011	CLERK OF THE BOARD	249,859	832,012	808,102	535,148	2,425,121
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